

What is the demand for grains, pulses and oilseeds on the European market?

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Grains, pulses and oilseeds (GPO) have a special place in the human diet. As such, they are the most widely cultivated and traded commodities within Europe. The bulk of GPO consumed in Europe are imported from nearby countries by multinational companies. But the growing demand for speciality food products, such as organics, gluten-free and superfoods, still offers potential for small and medium-sized suppliers from developing countries.

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1. What makes Europe an interesting market for grains, pulses and oilseeds?

Europe is a large consumer and importer of GPO that depends on imports from third countries to meet its demand for these commodities. At the same time, European consumers are increasingly looking for foods that are nutritious and produced sustainably. This makes Europe an interesting market for producers that can cater to the latest European market trends.

Europe is second-largest importer globally, shows moderate value growth

Europe is a large importer and consumer of GPO. Based on value, Europe is the second-largest importer of oilseeds and the third-largest importer of grains (Figure 1). Asia plays a much larger role. However, when taking population size into account, the European import value per capita is around three times higher than that of Asia. This important role is driven by a strong economic position of Europe, leading to high consumption of commodities. Moreover, Europe has a large livestock industry for domestic as well as export markets. Farm animals consume large volumes of feed, especially those containing grains and oilseeds.

Figure 1: Import values for grains, oilseeds, and pulses, 2021, incl. regional trade

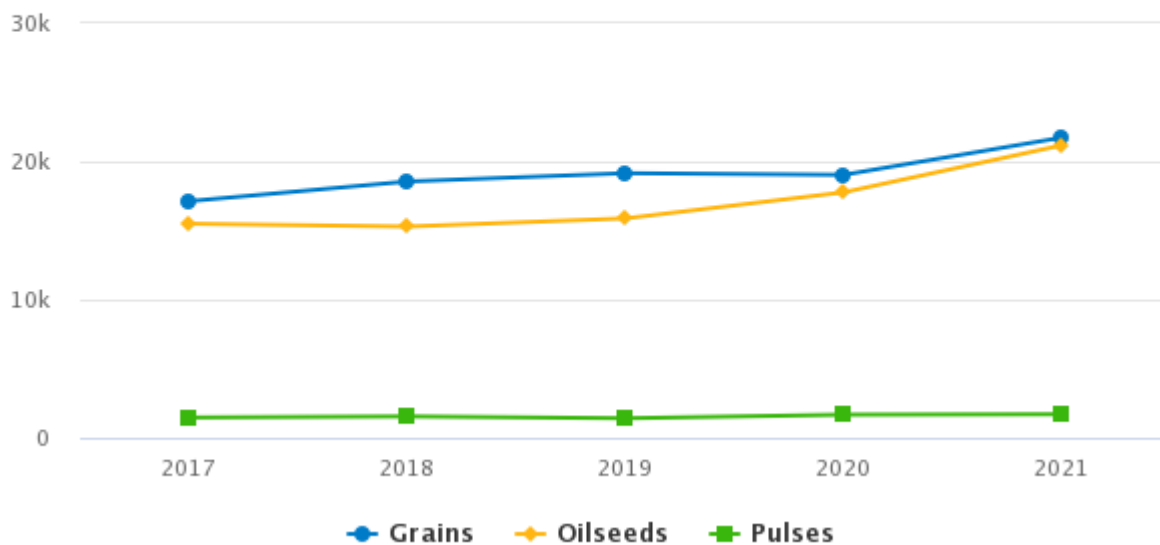
in € million

Source: ITC Trademap, 2022

The development of the important European market for grains and oilseeds showed moderate growth over the last five years (Figure 2). The mean annual growth rate (CAGR) of the value of grain imports between 2017 and 2021 stood at 6%, compared to a much higher 14% in Asia. The growth rate in oilseeds was similar in both regions, at 8% in Europe and 7% in Asia. Since 2020, the COVID-19 pandemic has particularly impacted transport and logistics costs in international trade. Not yet reflected in these numbers is the additional impact of the war in Ukraine since February 2022 and the rapidly rising inflation worldwide.

Figure 2: Value of European imports of grains, oilseeds and pulse

in € million



Source: ITC Trademap, 2022

Europe depends on imports for many grains, pulses and oilseeds

Europe's domestic production of various important GPO is too small to fulfil demand. Their uses are diverse, ranging from staple food products to animal feed and industrial uses like biofuels. Different GPO as well as products made from them are also used as lower-quantity, high-value ingredients for food products. Volatility in these markets is high. This instability has further intensified due to the insecurities around the war in Ukraine and supply chain disruptions.

Animal feed sector consumes large volumes of agricultural commodities

Europe consumes almost a quarter of global protein feed, driven by the importance of animal products in the region. The [animal feed sector](#) accounts for a large part of domestic European production of GPO. Moreover, industrial compound feeds are a major recipient of bulk commodity imports.

Based on volume, key crops used as feed are maize, wheat and barley. In the European Union (EU), around 62% of total available [grain](#) volumes are currently consumed in animal feed (Figure 3). Less than one-fourth of grains produced in Europe are consumed as food. Europe produces sufficient wheat and barley. However, the lacking local availability of high-quality plant proteins is fuelling imports from around the world to fulfil the demand for industrial animal feeds. Moreover, protein-rich meals derived from the processing of soybeans, rapeseed and sunflower seeds are important sources of protein for farm animals. Soybeans and soybean meal are mostly sourced from Brazil, the USA and Argentina.

Table 1: European Union balance of important grains and oilseeds used in food and feed, 2021-2022, in million tonnes

	EU production	EU imports	EU exports	Net imports	EU feed use	EU food/ industrial use**
Wheat	125.8	2.7	30.5	-27.8	41.3	57.2
Maize	70.6	15.0	3.6	11.4	64.0	18.0
Barley	53.5	1.2	9.3	-8.1	34.9	10.5
Rapeseed	16.7	6.2	0.1	6.1	0.2	22.6
Sunflower seed	10.5	0.8	0.6	0.2	0.2	10.6
Soybeans	2.9	14.6	0.2	14.4	1.2	16.0
Soybean meal*	11.0	16.3	0.7	15.6	26.3	0.2
Rapeseed meal*	12.5	0.4	0.6	-0.2	12.4	0.0

Sunflower meal*	5.2	3.0	0.5	2.5	7.7	0.0
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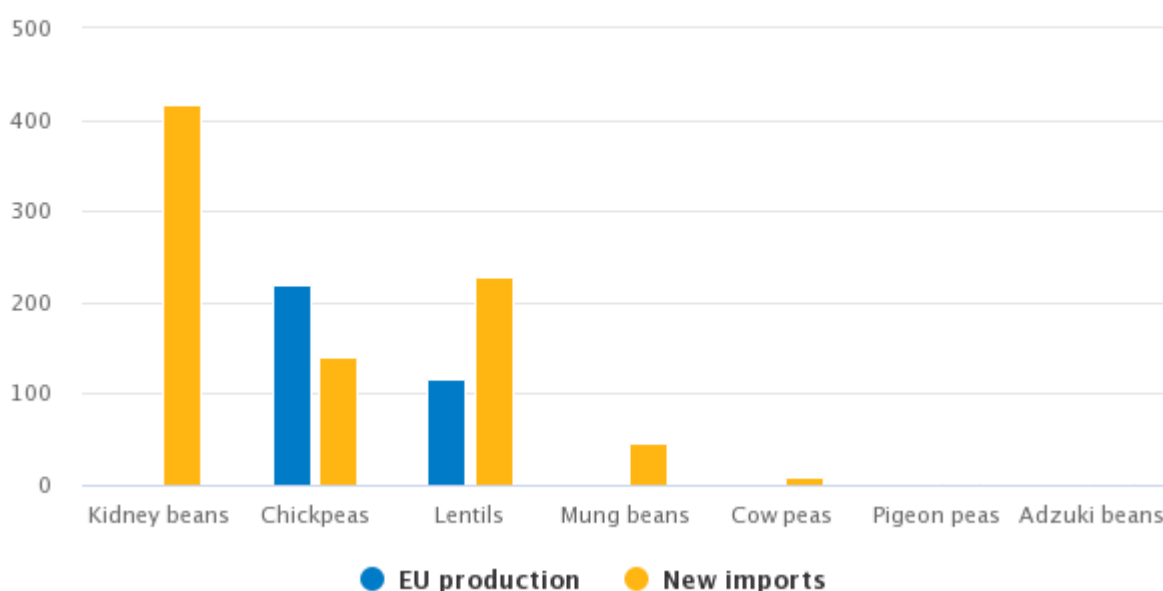
Source: [European Commission](#) (2022). Net imports = Imports minus exports. *Including direct imports from outside the EU and meals from EU crushing; **Including food, biofuels and other industrial applications.

Local production of pulses is complemented with imports

Looking at dry pulses and protein crops, only two are produced in substantial amounts in Europe – peas at 2.2 million tonnes in 2021, and broad beans at 1.8 million tonnes. Production of chickpeas and lentils has increased in recent years, but imports are still needed to meet growing demand. Other dry pulses are mostly imported from third countries (Figure 3).

Figure 3: European balance of smaller pulses, 2021

in 1,000 tonnes



Source: ITC Trade Map, 2022

Key origins of European imports of grains and development forecasts

Most grains consumed in Europe are regionally sourced. Europe is still a strong player in exports of wheat and barley in a growing world market. Competition especially from the Black Sea region was expected to increase in the coming years, but due to the impact of the war in Ukraine on production and trade routes it is unlikely that these expectations will be met in the short term.

Ukraine's role as a supplier of grains to the European market had somewhat decreased in recent years, yet it was still the largest trading partner with 28% of grain imports in 2021. These exports mostly consist of maize for animal feed and less of wheat. The temporary blockade of important shipping routes through the Black Sea since the start of the war as well as harvest disruptions in war-affected parts of the country disrupted Ukrainian exports to Europe. The role of Russia as a supplier of wheat and maize to the European market has also increased in recent years. However, the figures in Table 2 do not yet reflect the effects of the war. Sanctions imposed on Russia do not block exports of agricultural products as such unless the involved parties are on the sanction list, but [Russian grain exports have fallen nonetheless](#).

Table 2: Key non-European origins of European imports of grains in 2021, in € million

Supplier	Imports in € million	Share in total import value	2021 change compared to 5-year average	Main grains
Ukraine	1,908	28%	-10%	Maize (93%), wheat (4%)
Canada	1,010	15%	37%	Wheat (67%), maize (29%)
Brazil	699	10%	-6%	Maize (96%), rice (4%)
Pakistan	443	6%	29%	Rice (100%)
India	344	5%	2%	Rice (97%)
Russia	318	5%	19%	Wheat (51%), maize (38%)
Other origins		31%		

Source: ITC Trade Map (2022).

In the ten years to leading 2031, a [reduction in European cereal production is expected](#). For EU member states, this decrease is forecasted at -2.8%. This is due to a reduction in the cereal area and a decrease in yields due to climate change impacts. At the same time, grain consumption is also expected to decline. The important feed use in the European Union market could decrease by almost 8 million tonnes or -4.8% by 2031. The reduction in barley and soft wheat is expected to be stronger than in maize. Food use of cereals is forecasted to increase by 2% over the ten-year period.

Rice production in Europe is limited to some Mediterranean countries. Production is expected to decline slightly due to changing weather conditions with more droughts. Meanwhile, rice consumption is expected to increase by around 2.5% until 2031. Especially imports of indica rice from Asian countries that benefit from zero tariffs under the [Everything But Arms](#) (EBA) regime are set to increase by around 5% per year. Imports from non-EBA countries are expected to decline. An exception may be India: the country is in the process of closing a free-trade agreement with the United Kingdom, the top rice importer in Europe.

Key origins of European imports of oilseeds and development forecasts

The figures in Table 3 only include unprocessed oilseeds. Soybeans, rapeseed and sunflower are largely crushed. This process results in the two main products: vegetable oil and oilseed meals. The meals are used in the production of industrial compound feeds for the production of meat, dairy and eggs. While part of the oilseed imports to Europe consist of unprocessed crops, especially Brazil and Argentina are also exporting large volumes of soybean meal to the European market.

Key oilseeds imported to the European market are soybeans, groundnuts and rapeseed. Europe is marked by a significant supply gap of high-quality protein crops for its large animal product industry. The European Union

devised a plant protein strategy several years ago already, and is making the issue a priority in its [agricultural policy](#) as well as the [European Green Deal](#) and the [Farm to Fork](#) and [biodiversity](#) strategies. However, it is unlikely that domestic production will manage to fulfil the large demand in the short term.

Oilseed imports from Ukraine in 2021 still accounted for 12% of total European imports by value, mostly consisting of rapeseed. Similarly to grains, these imports will likely be affected by the war in 2022 and beyond.

Table 3: Key non-European origins of European imports of oilseeds in 2021, in € million

Supplier	Imports in € million	Share in total import value	2021 change compared to 5-year average	Main oilseeds
Brazil	4,527	33%	61%	Soybean (98%), groundnuts (1%)
USA	2,302	17%	-6%	Soybean (92%), groundnuts (4%)
Ukraine	1,687	12%	26%	Rapeseed (79%), soybean (14%)
Canada	1,343	10%	28%	Soybean (49%), rapeseed (39%)
Australia	1,209	9%	62%	Rapeseed (99%)
Argentina	717	5%	8%	Groundnut (89%), sunflower (6%)
Other origins		14%		

Source: ITC Trade Map (2022).

Key oilseeds produced in Europe are rapeseed and sunflower. Like the grains sector, a reduction in [demand and output is expected](#) in the coming years. The peak in oilseeds production is expected for 2027, after which it is set to decline. This decrease will be caused by a reduction in demand for feed and oils. Soybeans form an exception. Here an increase in European production is expected due to the growing demand for soybeans that are not genetically modified. Also, demand for organic soy will grow as feed for organic dairy cattle. For rapeseed, yield increases are expected to slow as the crop is more sensitive to extreme weather events and pests.

Forecasts up to 2031 still see Europe as a net importer of oilseeds, but imports are expected to decline as the overall demand is falling. Soybean imports are expected to drop by 10% compared to 2019-2021. Rapeseed imports are also expected to decline. Sunflower imports will remain stable throughout the next decade.

Key origins of European imports of pulses and development forecasts

Europe has a large production of certain pulses, especially peas and broad beans. Chickpeas and lentils are produced on a small scale. For other pulses the region relies on imports. Canada dominates the supply of dried pulses with a value share of 24% in 2021 (Table 4). Key crops imported from Canada are kidney beans and lentils. The country is the [largest producer of lentils globally](#) and an important supplier to world markets. Other important suppliers of kidney beans to the European market are Argentina, the USA and China. Russia [saw the highest growth rate in supplies to Europe](#) with a 63% value increase compared to the previous five-year period. This increase was due to a severe drought in North America, the world's largest pea-producing region. Russia's role in 2022 will likely be affected by the war in Ukraine, as explained above. Turkey, with its supply of lentils and chickpeas, also saw strong growth at 32%.

China is an important supplier of kidney beans and mung beans. However, it experienced the strongest decline in export value to the European market with a reduction of 24% in 2021 compared to the previous five-year period. Key [reasons for declining Chinese exports](#) in recent years are quality issues and higher production costs.

Table 4: Key non-European origins of European imports of pulses in 2021, in € million

Supplier	Imports in € million	Share in total import value	2021 change compared to 5-year average	Main pulses
Canada	268	24%	8%	Kidney beans (52%), lentils (35%)
Argentina	136	12%	9%	Kidney beans (88%), chickpeas (5%)
Russia	133	12%	63%	Peas (90%), chickpeas (6%)
USA	126	11%	-21%	Kidney beans (60%), lentils (22%)
Turkey	100	9%	32%	Lentils (56%), chickpeas (27%)
China	57	5%	-24%	Kidney beans (64%), mung beans (16%)
Other origins		25%		

Source: ITC Trade Map (2022).

The area [cultivated with pulses in Europe has grown significantly in recent years](#). Peas, field beans, lentils and chickpeas grow the fastest. Drivers of this trend have been policy incentives and growing domestic demand for both feed and human consumption. However, farmers are hesitant to grow more pulses as they are not easy to cultivate, plus the yields are more variable and lower than from other crops. Therefore, imports have increased

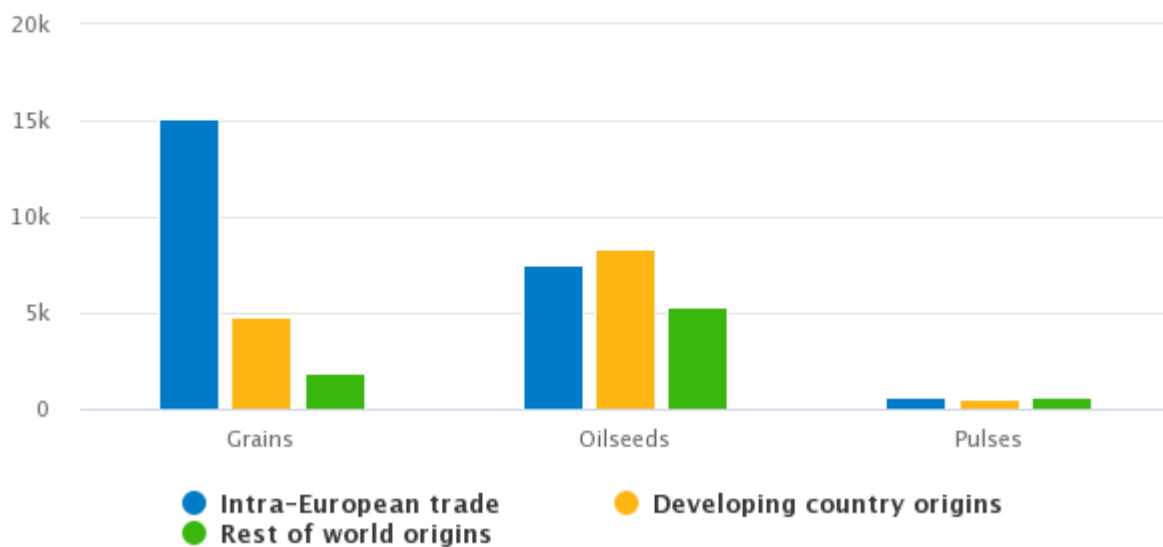
in past years to meet growing demand. Overall, it is forecasted that the cultivation area for protein crops in the European Union will grow by 19% until 2031, while yields are also expected to increase. As consumption, especially in feed, is expected to grow more slowly than production, imports of pulses should decline by about 37% by 2031.

Developing countries play important role as suppliers to Europe

The European trade in GPO is dominated by intra-European trade. But developing countries are also supplying significant shares, especially of oilseeds (Figure 4). Moreover, intra-European trade contains a certain share of re-exports from third countries. This is for example the case when soybeans are imported to the Netherlands, and the Netherlands then exports soybeans to Germany. Overall, in 2021 developing countries accounted for value shares of around 22% in grains, 31% in pulses and 39% in oilseeds.

Figure 4: Origin of European imports of grains, oilseeds and pulses in 2021

in € million

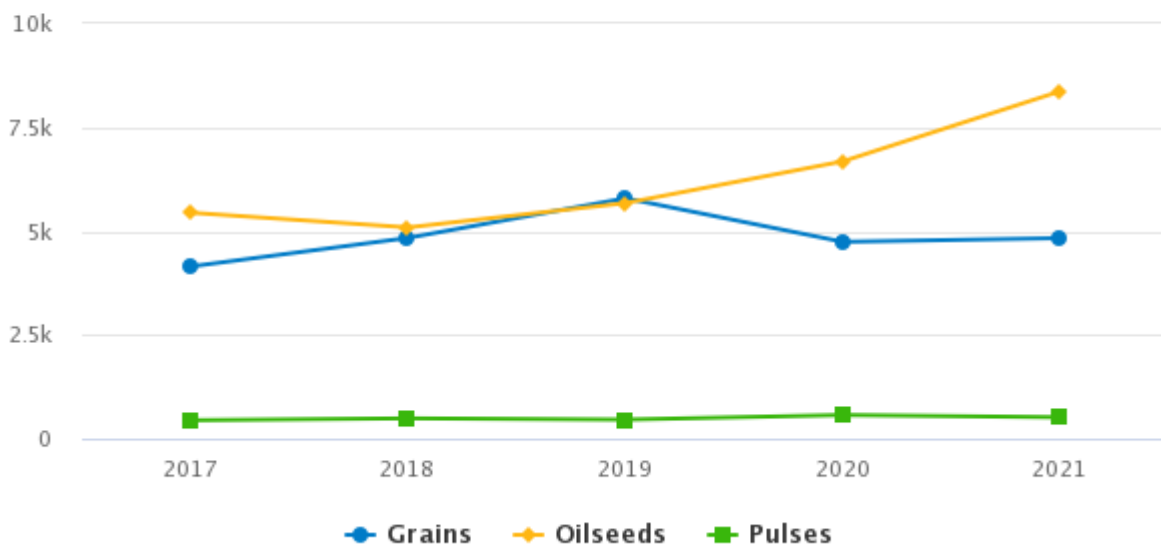


Source: ITC Trademap, 2022

During the five years from 2017 to 2021, the value of imports from developing countries in the three segments showed differing developments (Figure 5). While the value of oilseed imports saw a clear increase, the value of grain and pulse imports stagnated with some fluctuations.

Figure 5: Development of European imports of grains, oilseeds and pulses from developing countries

in € million



Source: ITC Trademap, 2022

Especially in grains and oilseeds, the ability to supply crops in large bulk volumes is an advantage. Location closer to the European market helps reduce logistical costs and transport time. Products like wheat, maize and rapeseed are mostly imported from nearby regions, like rapeseed and maize from Ukraine and sunflower seeds from Turkey and Moldova.

Long-standing relationships and trade agreements between various countries and the EU support the export of goods to the EU market, such as the [Association Agreement and Deep and Comprehensive Free Trade Area \(DCFTA\)](#) between the EU and [Ukraine](#); the [improved market access](#) granted to [Sri Lanka](#); and the [trade preferences granted to Indonesia](#) by the EU's Generalised Scheme of Preferences (GSP), under which about 30% of total imports from Indonesia enjoy lower duties. Least developed countries like Bangladesh, Burkina Faso, Ethiopia, Mali and Myanmar benefit from the EU's [Everything But Arms \(EBA\) scheme](#), which provides duty-free, quota-free access for all exports to the EU except for arms and ammunition.

It is important to note that the average shares in large categories like grains or oilseeds do not give a full picture of the role that developing countries play. Their share can be much higher in crops where certain countries or regions have a competitive advantage or unique position. This is the case for crops that rely on tropical or subtropical climates for their cultivation, such as [sesame](#) and [pigeon peas](#). Production of some crops is limited to even smaller regions – examples of such special grains are [quinoa](#) from the Andean region of Latin America and [fonio](#) from the Sahel region of West Africa. These products are currently still limited to niche markets in Europe, but offer potential for small and medium-sized producers from developing countries that can deliver a product with special qualities or a unique story.

Tip:

Keep track of current developments on the European agricultural market. The European Commission publishes regular [economic updates](#) on the sector, with interesting trends insights.

Major trade hubs supply wider European region with commodities

Imports of agricultural commodities to Europe are in part directly arriving in the country where they are used. However, large bulk deliveries and containerised goods often enter Europe through one of the large trading hubs. From there smaller volumes are redistributed throughout Europe. The strategic location and connection of ports with fluvial, railway and road networks are required to efficiently organise the distribution of commodities. The presence of traders who handle the import, export, and sometimes also the processing of certain commodities influences which ports bulk shipments arrive through.

The [large maritime ports of Rotterdam, Hamburg and Antwerp](#), all located in northwestern Europe, are major trade hubs. All three of them have large capacities for handling cereals and oilseeds. Moreover, they have important container terminals and play a role in the import and distribution of smaller, containerised loads of specialty cereals and dried pulses. Oilseeds like soybeans or rapeseed are also frequently shipped through Amsterdam, which has large capacity for oilseeds handling and processing.

Rouen in France is an important European inland port and a key terminal for the export and transshipment of cereals, especially wheat. The Danube ports in Eastern Europe are important trading hubs for cereals, pulses and oilseeds.

Niches for healthy and sustainable products offer opportunities for smaller suppliers

The demand for healthy foods is growing all over the world. The COVID-19 pandemic brought an increased interest in foods products that not only are nutritious, but also aren't linked to deforestation or to animal cruelty. This trend is even more visible in Europe, where almost [one in five Europeans regularly look for plant-based foods](#) as part of a vegan, vegetarian or flexitarian diet.

GPO such as fonio, quinoa, teff, mung beans, sesame and chia seeds are especially promoted for their high nutritional content. Often marketed as 'superfoods', these products are gaining ground in the European market. Grains like fonio, quinoa and teff are increasingly known for their suitability for gluten-intolerant consumers. This holds great potential for these products to go mainstream, especially in the important European bakery product segment. The same holds true for pulses like mung beans, lentils and dried beans. Their demand is growing together with increasing consumer awareness about the negative impacts of livestock farming on the environment and on the well-being of farmed animals. [Pulses are the fastest-growing segment in the plant-based protein market](#) – a market segment which grew at an annual rate of 30% between 2014 and 2019. This growth is expected to continue or even increase in the future.

European consumers are also [increasingly concerned](#) about decent work conditions for producers in developing countries – including earning a living income. The rising demand for plant-based food ingredients that are produced under socially and environmentally sustainable conditions opens many opportunities for suppliers of tropical GPO. While Europe produces crops such as lentils and sunflower seeds, it is unable to meet its own demand and therefore relies on imports.

This deficit also persists for organic GPO. Demand is driven not only by direct human consumption, but also by the [strong growth of organic animal products, especially dairy and eggs](#). This segment consumes a large volume of organic cereals and oilseeds. [Top markets for organic products](#) include Germany, France, Italy, Switzerland and the UK. Organic retail sales in Europe increased by 15% between 2019 and 2020. The COVID-19 pandemic was an important driver of this growth. It is expected that [European organic demand will continue to grow](#), with grains playing an important role in food and feed.

Despite the increasing demand, gluten-free, vegan, Fairtrade-certified and organic-certified food products remain niche markets. Part of realising their mainstream potential is expanding their distribution channels to include actors capable of trading larger volumes. Suppliers from third countries can do their part by becoming reliable suppliers of quality food products and establishing relations with major European traders.

Socioeconomic and political events have a major impact on agricultural markets

Commodity markets are known to be volatile. Several significant socio-economic and political events can be identified that will influence the European demand for imports of GPO beyond 2022.

Rapidly increasing prices and inflation

The recovery of demand after the global COVID-19 recession, [rapidly climbing prices for shipping containers](#) and the war in Ukraine had significant impacts on the price of cereals and oilseeds. For example, prices for milling wheat increased from around €150 per tonne in July 2020 to €300 in February 2022. Since then, prices reached peaks exceeding €400 in July 2022. The agreement signed by Ukraine and Russia in July to resume grain exports from Ukrainian Black Sea ports may provide some relief for the international grain market. However, availability of crops from Ukraine is expected to be much smaller than in previous years and likely to remain lower for the time being. Moreover, trade with Russia is likely to be smaller than in previous years. Countries that rely heavily on imports of grains, oilseeds, fertilisers and energy products will [experience ongoing supply chain disruptions and strong price increases](#).

The market in the United Kingdom is expected to be particularly affected by [rising prices for agricultural products](#). The country is highly reliant on food imports. Impacts of Brexit become visible in the form of higher administration costs and labour shortages leading to higher wages for farmers and food producers.

Extreme climate events reduce European crop production

The hot and dry weather of 2022 has caused severe damage, especially to European summer crops. Maize yields, mostly used for animal feed, [are expected to fall by 16%](#) compared to the average from the preceding five years. Sunflower harvest is expected to be 20% lower than in the previous year. Warm and dry conditions may somewhat benefit the coming winter crops of wheat, barley and rapeseed. Overall, the lower domestic production may lead to a further surge in imports from third countries. In the future, increasingly frequent extreme weather events happening on a global scale will disrupt agricultural supply chains more often and further increase market volatility.

EU policies prioritise self-sufficiency and sustainability standards, but EU-wide protein strategy still missing

The agricultural policy of the European Union (CAP) provides several [measures to support the regional production of protein crops](#). It aims to reduce the supply gap in plant proteins and the dependency on imports, which are connected to environmental and social issues in third countries. The new CAP will enter into force in 2023. It seeks to incorporate the sustainability goals of the [European Green Deal](#) as well as the [Farm to Fork](#) and [biodiversity](#) strategies. However, several EU member states believe that the current [efforts to reduce dependency on crop protein imports are not enough](#). They call for a European-wide protein strategy that would increase local production, strengthen inner-European supply chains and invest in research and innovation.

Some of the targets included in the new EU agriculture strategy could impact imports from conventional production. Among others, a [50% reduction in pesticide use by 2030](#) is planned. It also seems likely that maximum residue limits on imported products will be further tightened. An example is the pesticide glyphosate, which is widely used in the production of agricultural commodities around the world. It is currently approved in the EU until 15 December 2022. This approval may not be renewed. Moreover, it is likely that such a ban on its use would also be followed by stricter glyphosate residue limits and therefore also affect imports.

Regardless, for the foreseeable future Europe will remain dependent on imports of various agricultural products. Especially niche products that are not produced locally and that fit into the trend towards healthy and more sustainable foods will remain in demand.

Demand from European animal feed sector expected to decline

Various factors are influencing the future demand for GPO by the important European [animal feed](#) sector. The pig and poultry segments are reducing production due to low farmgate prices for animal products, the high cost of feed ingredients and the spread of avian influenza outbreaks in several countries. The uncertainties around the war in Ukraine and its impacts on supply chains as well as energy prices are also affecting demand.

In the longer term, demand will be reduced by measures of European countries to cut their livestock herds to reduce damaging emissions. For example, [nitrogen emissions in the Netherlands must be cut by 70%](#) in key parts of the country by 2030. Further EU measures for the reduction of climate-damaging emissions from local consumption and supply chains abroad ([deforestation-free](#) supply chains) are expected in the short term. Improvements in feed use efficiency will reduce demand.

Environmental concerns are also a key reason why the [EU - Mercosur trade agreement](#) has not been ratified yet. The deal between the European Union and the Mercosur countries Argentina, Brazil, Paraguay and Uruguay has been under discussion for years. EU member state governments and civil society [have raised concerns](#) about the role of the deal in promoting intensive agriculture and causing deforestation in Latin America through increasing trade. Soybean and maize cultivation are among the key drivers of deforestation in these countries.

Tips:

Read the CBI market information on the [EU Green Deal](#) and how the actions to reduce greenhouse gas emissions may impact your business.

Consult the [EU Pesticides Database](#) to learn about the [Maximum Residue Levels \(MRLs\)](#) for pesticides.

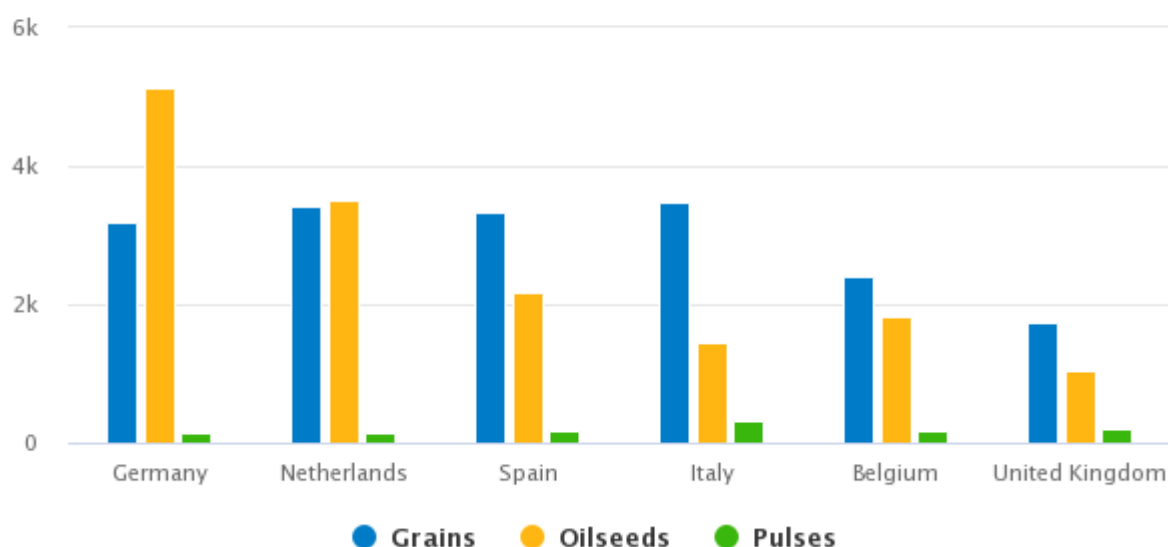
Read the [CBI trends study](#) for more information about organic, sustainable and 'free-from' products.

2. Which European markets offer most opportunities for grains, pulses and oilseeds?

All European countries import grains, pulses and oilseeds. However, there are considerable differences in the markets for the three product groups, influenced by factors like differing agricultural sectors and consumption patterns. The key European importers of these product groups are Germany, the Netherlands, Spain, Italy, Belgium and the UK (Figure 6). They all have certain niches that make them interesting for producers from developing countries. Germany, the Netherlands and Belgium play a special role as they also act as distribution hubs to the wider European market.

Figure 6: Key European import markets for grains, oilseeds and pulses from all origins, 2021

in € million

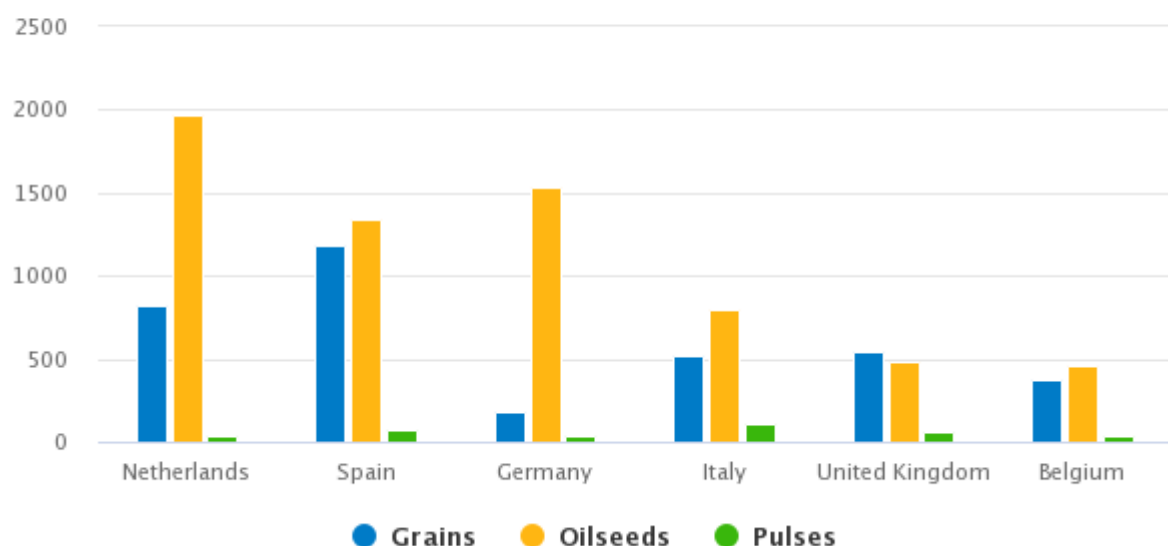


Source: ITC Trademap, 2022

When only looking at trade relationships with developing countries for these three product segments, the same countries play important roles but in a somewhat different order of importance (Figure 7).

Figure 7: Key European import markets for grains, oilseeds, and pulses from developing countries, 2021

in € million



Source: ITC Trademap, 2022

The Netherlands: Leading European distribution hub

The Netherlands is among the top importers of bulk oilseeds like soybeans (first by value) and sunflower seeds (second) as well as grains like maize (second) and barley (first). A large share of these imports is re-exported to other destinations, either directly or after processing in the Netherlands. The country reported the [third-largest volume of soybean crushing](#) in Europe in 2021 (around 20%).

The role as trading hub is driven by efficient logistics and excellent connectivity of the large Dutch overseas ports of Rotterdam and Amsterdam with inland European destinations. Another import driver is the large Dutch animal feed industry. The Netherlands is home to [some of the largest animal feed producers in Europe](#), including ForFarmers, Nutreco, Agrifirm and De Heus. The Dutch industry accounted for 10% of total European animal feed [production](#) in 2021. It supplies the large Dutch animal farming sector as well as export markets.

The Netherlands is also an important entry market for niche grains and oilseeds. It is, for example, the second-largest importer of [chia seeds](#) and [fonio](#) and the third-largest importer of [sesame seeds](#) and [mung beans](#) from developing countries. Various specialised traders operate in the Netherlands, including [AGT Foods](#), [Van Sillevoldt Rijst](#) and [Rhumveld](#).

The Netherlands is likewise [an important trading hub for organic products](#), especially for re-exports to Germany and the Scandinavian countries. Important actors in the trade of organic specialty GPO are [Tradin Organic](#), [Do-It Organic](#) and [Doens Food](#).

Spain: Feed industry drives imports

Spain's role as a top importer of GPO is largely driven by its [deficit in local production of feed ingredients](#). Spain was the third-largest importer of soybeans in 2021, and fourth-largest of sunflower seeds. With a share of around 17%, Spain is the largest European producer of industrial compound feeds, serving the country's substantial pig herd as well as cattle and poultry. Spain was the [largest European processor of soybeans in 2021](#) (22%) and the fourth-largest of sunflower seeds (14%). Brazil is an important supplier of soybeans, reaching a value of €1.2 million in 2021. Spain is also one of the largest importers of maize, again driven by the animal feed industry. Important suppliers in 2021 were Ukraine with a value of €510 million and Brazil with €408 million.

Next to the feed segment, Spain is also a large food market for protein crops. Pulses are an important traditional food ingredient and domestic production is topped up by [large volumes of imports](#), especially of dry beans. The country is [dependent on imports to fulfil around 50% of its demand](#) for pulses, and even up to 75% of the demand for dry beans. Part of that demand is re-exported after processing and canning. Spain was the third most important importer of kidney beans in 2021, and, together with Argentina, the largest supplier in recent years. The value and volume of kidney bean imports has consistently climbed in the last five years. Another frequently imported protein crop are chickpeas, with Mexico as the leading non-European supplier.

Germany: Importer and crusher of oilseeds, important organic market

Germany is the leading European importer of GPO. Factors driving this demand are the size of the population, a large feed and food sector and the country's role as a transshipment hub to other European countries, especially in Eastern Europe. Part of the imports arrive via the Netherlands. The inland German port of [Duisburg](#) plays an important role in further distribution to landlocked European neighbours.

Among bulk oilseeds, in 2021 Germany was the largest importer of rapeseed to Europe and the fourth-largest importer of soybeans. While rapeseed was mostly sourced from Australia and European countries, a larger share of soybeans is imported from developing countries like Brazil and Ukraine. [Crushing of different oilseeds totalled 13.1 million tonnes](#), of which 9.5 million tonnes of rapeseed and 3.4 million tonnes of soybeans. This made Germany the largest oilseed crusher in the European Union. The country is the [leading processor of non-genetically modified \(non-GM\) oilseeds](#), which are in demand in Germany as well as in some other European countries to serve consumer demand for meat, dairy and eggs produced with GM-free feeds. Processor [ADM](#) recently announced a further expansion of GM-free operations in its oil mill in Mainz.

The German market offers interesting opportunities for the introduction of niche grains and seeds. Germany is the top European importer of sesame and quinoa, and among the leading importers of groundnuts, linseed, poppy seeds, millet, chia seeds, and other niche cereals and seeds supplied mostly by developing countries. One factor driving this market in Germany is the large diversity of breads and high per capita consumption of bread. Moreover, the market for healthy food products and organic-certified products still has high growth rates.

Germany accounts for around one third of organic food sales in the European Union and saw historic growth during the COVID-19 pandemic.

Owing to traditional consumption and a sizeable consumer market for healthy foods, Germany is also an interesting destination for pulses. With companies like [Schlüter & Maack](#) and [Müller's Mühle](#), it is home to several large importers and processors. Germany also has several importers of pulses focussing on the ethnic food market, including [Pamir Food](#), [Heuschen & Schrouff](#) and [CFT](#).

Italy: Large market for durum wheat and pulses, niches for specialty products

Italy's market for grains, pulses and oilseeds has rather unique features. In European terms, it has considerable domestic production of rice and soybeans, as well as pulses like lentils. Moreover, its large pasta production, consumption and export make it the largest user of durum wheat in the region. The food market is known for high-quality foods, which are often produced under the EU's system of protected geographical origins.

In addition to domestic production, Italy is the largest European importer of pulses from developing countries. Italy is the largest importer of kidney beans and lentils, and the second-largest importer of chickpeas and broad beans. Important developing country suppliers of pulses include Turkey and Mexico for chickpeas. Argentina is an important supplier of kidney beans, with increasing volumes and values in the last five years. China is also an important supplier, although its role has been decreasing in recent years due to quality issues and climbing prices.

An important customer for pulses is the [Italian processing and canning industry](#), which serves the domestic market as well as various export markets. Leading companies include [Gruppo La Doria](#) and [Cirio](#). While Italian cuisine is focussed on traditional dishes, the growing immigrant population as well as interest in health foods also offer opportunities for less-known pulses.

The food sector with pasta and pizza as staple foods is also the main driver of Italy's role as the top European importer of durum wheat, accounting for almost 50% of total European trade in 2021. The value of imports reached €718 million in 2021. Most of these supplies are sourced from Canada and Australia. Kazakhstan and Turkey are important developing country suppliers. While Kazakhstan lost in market share in recent years, Turkey managed to quickly increase its share, despite coming from a low level.

Demand is still much smaller than in markets like Germany and the United Kingdom, but Italy's strong grain-based food industry and an established gluten-free product segment offer potential for specialty grains like [teff](#) or [fonio](#). Italian company [Obà Foods](#) started the Novel Food approval process for fonio and recently launched fonio pasta and fonio flour.

Italy is the largest European producer of soybeans. However, due to the high animal feed demand Italy is also among the top-5 importers of soybeans in Europe. Imported volumes increased by around 70% in the last five years, with Brazil as the main supplier (58% in 2021). The market for smaller oilseeds like sesame or poppy is comparatively small.

United Kingdom: Large ethnic market drives demand for rice, pulses

The United Kingdom has domestic production of key cereals like wheat, barley and maize, but also requires imports. Wheat imports mostly rely on Canada and other European suppliers. Imports are also required to meet demand for maize, for use in animal feed as well as biofuel production. The top supplier in recent years was Ukraine, supplying around 22% of the total value in 2021.

Large ethnic communities especially from India, Bangladesh and Pakistan make the UK the largest European importer of husked and basmati rice. Demand is also driven by Asian dishes having become a mainstream food across the British population. [Various large rice packers](#), like [Tilda](#) and [Westmill](#), serve the British market. The

UK also offers an interesting market for specialty rice [varieties](#) as well as ethical brands. Brexit may mean that opportunities for direct trade with Asian countries become available.

The most important rice supplier in the last five years has been India, with strong fluctuations in supply over the years. During the same period, the second-biggest supplier, Pakistan, managed to almost double its supplied volumes. Indian suppliers may be at an advantage though, due to advanced negotiations for a [free trade agreement between India and the United Kingdom](#).

The UK is also an important market for imports of dried pulses, second only to Italy. This demand is importantly driven by the ethnic food market. The country imports large volumes of various pulses and is the top European market for non-traditional varieties like [pigeon peas](#) and cow peas. These are imported almost exclusively from developing countries. In the case of pigeon peas, key origins are Malawi and India. For cow peas, Peru, Madagascar and Myanmar are the main suppliers. With a growing share of the population [switching to plant-based diets](#), the British market offers good opportunities for innovative protein products.

Belgium: Important entry point for pulses and linseed

Belgium is another trading hub in Europe. The country takes a leading role in the trade with pulses. This includes more exotic pulses, which are often imported from developing countries, like [mung beans](#), adzuki beans and [pigeon peas](#). Important suppliers from developing countries are Tanzania, Thailand, China and Argentina. Much of the imported volumes are re-exported to other European destinations, and in the case of pigeon peas also to the Americas. An important Belgian trader in pulses is [Casibean](#).

Belgium has also established itself as a [leading importer of linseeds](#). This role is due to a relevant processing industry located in Belgium, including the companies [Van de Putte Group](#), [Flaxseed Trading](#) and [Faay](#). Just across the border, Dutch company [Van der Bilt](#) is another important processor located close to the port of Antwerp. The oilseed has various food uses as well as important industrial applications. In 2021, Belgium accounted for around half of the total trade value in the European region. Key suppliers of the Belgian market worth around €380 million in 2021 were Russia and Kazakhstan, jointly accounting for around €260 million.

Tips:

Consider attending a European trade fair to meet potential European buyers and get a better idea of their requirements. Important food fairs in Europe include [Anuga](#) (Cologne, Germany), [Biofach](#) (Nuremberg, Germany, the world's largest organic trade fair), [Food Ingredients Europe](#) (2022 in Paris, France), as well as international bakery trade fairs [Südback](#) (Stuttgart, Germany) and [iba](#) (Munich, Germany).

Invest in online marketing. A well-maintained website increases the visibility and reach of your company and creates a platform to promote your products.

3. Which grains, pulses and oilseeds from developing countries have the most potential on the European market?

The specialist and niche market products of specialty rice, sesame, groundnuts, fonio, teff and mung beans provide the best opportunities for small and medium-sized producers to access the European market. Less established products like ancient grains and specialty pulses have the potential to open new markets and reach consumers with the story of their product. Bulk commodities like wheat or soybeans provide little opening to differentiate. They also must be supplied in sufficiently large volumes and require advanced logistics.

Please note that we base our results on high-potential product data from the [developing countries where CBI is](#)

[active](#). We calculate export volumes to the European market for these products, and define the European market as EU27+UK+European Free Trade Association. For more information on other high-potential products from CBI countries, read the [annex to this study](#).

Tips:

Make sure your products meet food safety and other requirements relevant for ingredients for human consumption before approaching potential buyers.

Focus on specific grains, pulses or oilseeds that you are familiar with and that perform well in your region. Organic cultivation can help access higher-value markets. Consult CBI's [trends study](#) for more insights.

Keep up with the latest trends and seize opportunities by subscribing to [CBI's Newsletter](#). You can select sectors of interest when completing your subscription to receive targeted information.

Speciality Rice - Demand for indica varieties drives Europe's imports

Europeans consume both japonica and indica rice varieties. However, exotic, indica-type rice such as basmati and jasmine are the preferred varieties in northern Europe. Japonica varieties are much more preferred in Southern Europe – probably because the variety has been grown in that region for centuries and is part of the culinary tradition of countries like Italy and Spain. In fact, [japonica varieties account for 75%](#) of the [1.7 million tonnes of rice that Europe produces](#) every year. Europe still imports 1.2 million tonnes of mostly indica rice every year. Rice in Europe is mostly consumed as food, though some broken rice goes into industrial applications. Europe's low production of indica varieties opens up opportunities for suppliers from third countries, especially for those trading in specialty or aromatic rice.

In general, rice consumption in Northern Europe is lower than in Southern Europe, where rice is grown traditionally (Figure 8). [Europe's largest rice consumer is Portugal](#), with an average consumption of 12.3 kg per person per year. On the other side of the spectrum are countries from the former Yugoslavia, where as little as 0.9 kg per person are consumed.

Product	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average	Share developing countries 2021	5-year average	Difference 2021/ 5-year average	Share CBI countries 2021
Rice in the husk	16.3	32%	12.9	64%	98%	0.1	103%	1%
Husked or brown rice	615.8	15%	562.0	12%	89%	8.6	23%	1%
Semi-milled or wholly-milled rice	746.8	2%	699.7	1%	93%	62.0	-4%	8%
Broken rice	195.7	24%	183.5	24%	94%	92.2	6%	40%

Source: ITC Trademap (2022). Not considering inner-European trade.

Tip:

Read CBI's study on [exporting specialty rice varieties to Europe](#) to learn about the most promising markets for specialty rice in Europe.

Sesame - Growth market within the ethnic ingredients category

The European market for ethnic ingredients – products that are traditionally used in other regions of the world but are relatively unknown in Europe – continues to grow. It includes products that are already in high demand, such as sesame and chickpeas, as well as products that are mostly sold in ethnic food retail channels and are not yet part of the mainstream consumer market. Examples are pulses like [pigeon peas](#), cow peas and grains like [teff](#). Countries with larger ethnic populations and wholesalers dealing with these products influence the way these products enter the European market.

Focus: Sesame

The European market for [sesame seeds](#) is divided into traditional use, especially in Europe's large bakery sector, and a growing ethnic market. The traditional market for use in the bakery and confectionery sector is seeing little growth as it is mature. However, especially demand for sesame paste (*tahini*) has grown rapidly due to its use in the increasingly popular chickpea paste, *hummus*. The demand for this traditional, healthy dip from Middle Eastern countries has risen across Europe. Moreover, sesame is increasingly used as a healthy ingredient in vegetarian and vegan diets.

When looking at imports from non-European countries, almost all sesame is imported from developing countries (Table 6). The total value of these imports reached €230 million in 2021, an increase of 11% over the previous five-year average. India used to be the main supplier of sesame seeds to Europe, along with Nigeria and Sudan. However, food safety concerns related to pesticide residues and lower harvests due to bad weather reduced Indian exports drastically in 2021. Therefore, other producers could increase their exports to Europe, especially Nigeria, Turkey and Pakistan.

Table 6: European import of ethnic crops from developing countries and CBI countries, 2017-2021, in € million and percentage

	Imports total		Imports from developing countries			Imports from CBI countries		
Product	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average	Share developing countries 2021	5-year average	Difference 2021/ 5-year average	Share CBI countries 2021
Bambara beans	0.1	71%	0.1	80%	100%	0.0	60%	14%
Cow peas	9.1	16%	8.5	14%	92%	1.2	-51%	6%
Pigeon peas	3.0	-11%	2.9	-18%	89%	0.7	-60%	10%
Sesame seeds	230.4	11%	228.4	10%	99%	69.8	20%	33%
Melon seeds	51.3	5%	31.6	6%	62%	1.2	95%	4%

Source: ITC Trademap (2022). Not considering inner-European trade.

Tip:

Become familiar with European food safety requirements as well as the quality requirements of your buyers. The [CBI sesame study](#) provides an overview of key issues. Failure to meet quality requirements can result in loss of buyers and can damage your country's reputation as a supplier of quality products.

Groundnuts - Nutty oilseeds with great market potential

Oilseeds with high nutrient content are growing increasingly popular in Europe. With the momentum of 'superfoods', the demand for oilseeds such as [chia](#), sesame, [sunflower seeds](#) and groundnuts grows too. Sunflower and linseeds are subject of additional demand for edible oils. Linseeds are high in demand in the paint manufacturing industry too. The [demand for sunflower seeds for birdseed](#) has been growing since the beginning of the COVID-19 pandemic and this growth is expected to continue. These developments open various opportunities for suppliers from developing countries.

For some smaller oilseeds, like chia, hempseeds and pumpkin seeds, no detailed trade figures are available (part of 'other' oilseeds). While their growth slowed down after an initial boom, food innovation holds big potential for them. Especially their high content of omega-3 fatty acids makes chia and hempseeds popular products for people following a vegetarian or vegan diet. Pumpkin seeds are a popular ingredient in the bakery sector. The [trade in hempseeds is expected to benefit](#) from a recent decision by the European Commission to harmonise the maximum allowed limits of its psychoactive ingredient, THC. [Hempseeds have market potential](#) due to their high levels of protein as well as fibres, vitamins, omega-3 and minerals.

Chia seeds are mainly supplied from Latin American countries like Paraguay, Bolivia, Mexico, Peru and Argentina. China is a key supplier of hempseeds and pumpkin seeds.

Focus: Groundnuts

The [European market for groundnuts](#) (or peanuts) mainly consists of use as a roasted or fried salty snack. Consumption of 'natural', in-shell groundnuts is much lower, but benefits from the trend towards healthier snacking of recent years. Peanuts are also used as an ingredient, especially in peanut butter. Important brands of peanut butter include [Unilever's Calvé](#) and [Bredabest](#), a leading producer of private-label peanut products. Moreover, groundnuts are used in cakes and chocolate sweets, nut and grain bars and ethnic cuisines. Growing demand for nut-based snacks, nut butters and protein-rich foods will drive demand for groundnuts in the coming years. Groundnuts are a source of [unsaturated fats, fibre, proteins, vitamins and minerals](#).

Europe does not have its own groundnut production. It is the largest importing region for groundnuts in the world, accounting for almost one third of global trade in 2021. Most imports arrive shelled but unprocessed, while only a comparatively small share is still in-shell. Germany, the UK and the Netherlands are important European markets. The Netherlands is by far the leading country for imports and re-exports to other countries, either directly or after processing. Important market actors in the Netherlands include traders [Aldebaran](#) and [QFN](#). In Germany, [Intersnack](#) is an important processor that also exports to other European countries.

The most important supplier to the European market is Argentina, accounting for over 50% of the total import value of in-shell and shelled groundnuts in 2021. Other important developing market suppliers are China (9%) and Egypt (6%). Egypt has an important role as a supplier of in-shell groundnuts, supplying 40% of the import value in 2021. Market research by Mordor Intelligence [projects a compound annual growth rate of 4.5%](#) for the groundnut market in Europe for 2022-2027, offering interesting market opportunities for developing country suppliers.

Table 7: European import of healthy oilseeds from developing countries and CBI countries, 2017-2021, in € million and percentage

	Imports total		Imports from developing countries			Imports from CBI countries		
Product	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average	Share developing countries 2021	5-year average	Difference 2021/ 5-year average	Share CBI countries 2021
Ground-nuts in shell	133.8	12%	79.9	23%	65%	48.0	30%	42%
Ground-nuts shelled	954.3	-1%	853.4	3%	93%	5.7	125%	1%
Linseed	349.0	39%	165.6	26%	43%	0.1	-47%	0%
Sesame seeds	230.4	11%	228.4	10%	99%	69.8	20%	33%
Mustard seeds	77.0	10%	20.1	-2%	23%	0.0	37%	0%
Poppy seeds	18.2	-7%	10.5	-13%	54%	0.0	-65%	0%
Other oilseeds	213.8	11%	185.7	9%	86%	11.6	24%	6%

Source: ITC Trademap (2022). Not considering inner-European trade.

Fonio and teff - Ancient grains with mainstream market potential

With the growing health awareness of European consumers, the demand for 'superfoods' has increased too. Lesser-known grains are also increasingly valued for their nutritional qualities, including their suitability for people with coeliac disease (gluten intolerance). Amongst these are ancient grains, or grains that are central to diets in countries that still continue their traditional agricultural practices.

European 'old' grains such as spelt, buckwheat and barley have prepared the market for alternative grains, but cereals from outside Europe have been successful too. For example [quinoa](#), a grain from the Bolivian and Peruvian Andes, has become a common item in most European supermarkets. Crops such as teff and fonio have been introduced in Europe more recently and therefore remain niche products. But some market trends show mainstream potential for suppliers trading in these grains.

Focus: Fonio

[Fonio](#), a traditional grain grown for thousands of years in West Africa, made its official debut in the EU market in 2019, when the European Commission [designated it as a novel food](#), thereby approving its sale. Because of its recent entry into the EU market, fonio remains a niche product in Europe. A handful of European companies (including [Aduna](#), [Gaia](#), [Obà](#) and [Symfonio](#)) are very committed to bringing fonio into the mainstream. The coming years will reveal whether fonio will become the next quinoa (that is, whether it will become an alternative grain that thrives in the mainstream).

Although fonio is more expensive and more difficult to find (compared to the other grains it competes against, including [rice](#), teff, barley and, of course, quinoa), its nutritional qualities make it an excellent gluten-free option. Its traditional cultivation methods make fonio an attractive product for consumers who are concerned about the social and environmental impacts of global food systems. Consumer awareness about health and environment is growing rapidly. This is a market trend that presents great opportunities for fonio exporters. Currently, fonio is supplied in small volumes by producers from West Sahel, including Guinea, Mali and Burkina.

Focus: Teff

Because [teff](#) is a grain that does not have a category of its own in trade data (it is counted as 'other grains', together with amaranth and wild rice), it is difficult to know its European demand. Like fonio, teff was only recently approved for sale in the EU market and remains a niche product. But because of its nutritious and gluten-free qualities, teff could easily become a food ingredient for the baking segment as well as the organic segment. Precise trade data is difficult to come by, but most teff is produced in Ethiopia.

Table 8: European import of ancient and specialty grains from developing countries and CBI countries, 2017-2021, in € million and percentage

	Imports total		Imports from developing countries			Imports from CBI countries		
Product	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average	Share developing countries in total	5-year average	Difference 2021/ 5-year average	Share CBI countries in total
Buckwheat	2.9	21%	2.4	39%	98%	0.0	-17%	0%
Millet	24.1	8%	20.4	20%	94%	0.3	70%	2%
Fonio	0.2	96%	0.2	95%	96%	0.1	118%	78%

Quinoa	64.9	-18%	64.2	-18%	99%	0.0	-100%	0%
Other cereals	16.0	-3%	6.2	14%	45%	0.2	41%	2%

Source: ITC Trademap (2022). Not considering inner-European trade.

Tips:

Check whether your product is approved under the [European Novel Food Regulation](#). Traditional crops from other regions of the world may be considered as a 'novel food' on the European market. This means that they need to go through an authorisation process.

Think about your unique selling point. Storytelling around specific origins, traditional uses and production methods can be powerful marketing tools.

Mung beans - Protein-rich pulses continue to gain in popularity

The [European import of various dried pulses has experienced significant growth](#) in recent years, and offers good opportunities for developing countries. Their success owes to various factors, such as a growing popularity of plant proteins. The convenience of pre-cooked pulses produced by the large European canning industry adds to their role in healthy diets. The rapidly growing market for pulses has in some cases led to higher production volumes and a resulting drop in price. This has been the case for chickpeas.

The market for [chickpeas](#) has benefitted from the growing popularity of Mediterranean and Middle Eastern cuisines and healthy products like hummus, a chickpea-based dip. Chickpeas are sourced from European as well as non-European origins. Among developing countries, Mexico and Turkey are the largest suppliers with values of €30 million and €26 million, respectively, in 2021. However, while imports from Mexico saw a decrease of around 22% in the last five years, Turkey managed to increase its export value by 86% during this period. Mexican production dropped due to low prices for chickpeas.

For fava beans (broad beans) and peas, it is important to note that there is large European production that fulfils a significant share of the market demand. [Animal feed remains an important market](#) for fava beans. The value of inner-European trade in fava beans in 2021 was about ten times higher than that from other origins. The United Kingdom, Lithuania and Germany are important suppliers. Imports from outside Europe are dominated by developing countries with a share of 83% of the value. Important suppliers are Egypt, Morocco and Turkey. For peas, the value of inner-European trade was around 40% higher than that with third countries. Ukraine was the largest developing country supplier of dried peas to the European market in 2021.

The highest value in the trade with pulses was achieved by [kidney beans](#), totalling €462 million for imports from outside Europe in 2021 and showing continuous increase. Developing countries play an important role in this supply, with a value of €239 million in 2021 or more than half of the total. Important developing country suppliers are Argentina, China and Egypt. However, [China's exports declined significantly](#) in recent years due to lower quality and increasing production costs.

Focus: Mung beans

[Mung beans](#) are a versatile pulse used in food and feed. They are a traditional ingredient in ethnic cuisines in South Asia and are increasingly finding a market as a healthy protein source. Moreover, mung beans are the most important pulse used for sprouting.

While mung beans have not achieved the same level of popularity in Europe as other pulses like chickpeas and dried peas, recent years have seen a steady growth in demand. In 2021, Europe imported 45,000 tonnes, which is almost 40% more than a year earlier. This development may reflect the increase in demand for plant-based food during the COVID-19 pandemic. The market increase for mung beans is expected to continue in coming years.

Large importers of mung beans to Europe are the United Kingdom and Belgium. The UK's large Indian community is an important driver of this market, as mung beans are traditionally used in Indian cuisine. Belgium is mostly an important trading hub for pulses. Developing countries are important suppliers, accounting for more than 85% of the value of imports to Europe. Important suppliers are Myanmar, Tanzania and China. While supplies from Myanmar and China did not show much growth over the last five years, Tanzania managed to increase its exports to Europe from a value of less than €100,000 in 2017 to €9.5 million in 2021.

Table 9: European import of dried pulses from developing countries and CBI countries, 2017-2021, in € million and percentage

Product	Imports total		Imports from developing countries		Share developing countries 2021	Imports from the CBI countries		Share CBI countries 2021
	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average		5-year average	Difference 2021/ 5-year average	
Peas	136.8	30%	42.2	-24%	18%	0.3	53%	0%
Chick-peas	155.7	-22%	93.7	-21%	61%	1.2	-48%	1%
Mung beans	39.2	62%	33.7	51%	80%	12.8	10%	22%
Kidney beans	426.1	9%	217.5	10%	52%	36.1	24%	10%
Beans Vigna & Phaseolus	31.0	2%	17.5	10%	61%	2.1	-17%	6%
Lentils	195.4	3%	61.7	14%	35%	1.7	-23%	1%
Fava beans	10.3	30%	8.6	9%	69%	5.8	7%	46%

Source: ITC Trademap (2022). Not considering inner-European trade.

Tip:

Watch the [recording of the CBI webinar on pulses](#), which summarises the latest trends and opportunities for niche pulses on the European market.

Sunflower seeds - Global supply chain disruptions open opportunities for suppliers

Sunflower seed is a consolidated market with mostly larger traders importing sunflower seeds to Europe from nearby countries. However, the armed conflict between Russia and Ukraine – the world’s largest sunflower seed producers and major suppliers of Europe – has exacerbated the supply chain disruptions caused by the COVID-19 pandemic.

While Europe produces large volumes of sunflower seeds, it still depends on imports from third countries to meet its demand. Most of Europe’s sunflower seed demand is in the crushing segment. But sunflower seeds are increasingly used as a baking ingredient and for direct consumption as convenient and healthy snacks. With traders looking to fill the supply gap left by Russia and Ukraine, suppliers from developing countries can find plenty of opportunities in the European market.

Moldova is Europe’s largest supplier of sunflower seeds but imports have decreased in the past five years. Sunflower seeds are Moldova’s second most important export product. Its export volume to Europe exceeded 126,000 tonnes in 2021. Argentina’s exports had been steadily increasing until they underwent a decline in 2021. China’s exports, by contrast, have been rising, albeit modestly, in the past five years.

Sunflower seed suppliers from developing countries looking to enter the European market can find [opportunities in niche market segments](#) such as organic and Fairtrade. The demand for organic sunflower seeds is rising in France and Romania, two European markets with large crushing capacity. Market entrants who are working on improving the quality of their seeds can find opportunities in the birdseed segment, which does not require A-grade seeds.

Table 10: European import of dried pulses from developing countries and CBI countries, 2017-2021, in € million and percentage

	Imports total		Imports from developing countries			Imports from CBI countries		
Product	5-year average	Difference 2021/ 5-year average	5-year average	Difference 2021/ 5-year average	Share developing countries 2021	5-year average	Difference 2021/ 5-year average	Share CBI countries 2021
Wheat & meslin	677.0	-7%	293.4	-36%	30%	0.1	-4%	0.0%
Maize	3,277.5	0%	2,890.5	-1%	87%	0.4	148%	0.0%
Soybeans	6,044.4	27%	3,260.1	49%	63%	18.7	-41%	0.3%
Low erucic rape or colza seeds	2,293.8	40%	1,063.0	34%	44%	0.0	82%	0.0%
Sunflower seeds	510.8	-5%	320.5	10%	73%	1.9	24%	0.4%

Source: ITC Trademap (2022). Not considering inner-European trade.

Tips:


Check the [CBI product studies](#) to get more detailed information on promising products for developing countries.

Get to know your competitors by visiting their websites and see what approaches they use to place their products on the European market. Examples of other developing countries gaining market share in Europe can give you important insights.


This study was conducted on behalf of CBI by [Profundo](#).

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